

## Submit a Concur Expense Report Prepared by the SSC

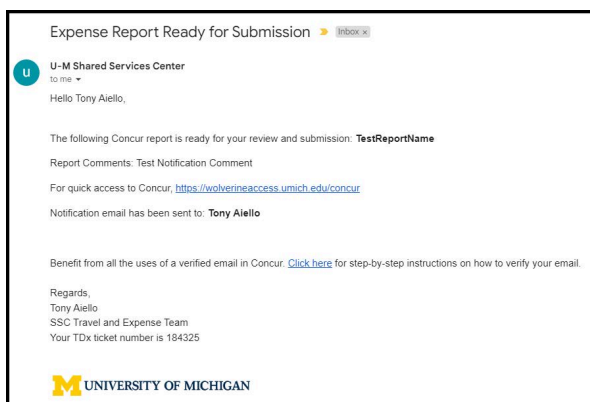
**Navigation:** *Wolverine Access* → *Browse Categories* → *Financial Services* → *Expense Reporting (Concur)*  
You will need to log-in with your username and UMICH password

**Description:** This document describes how to submit an expense report that was prepared by the SSC to your approver. System notifications come from the sender *U-M Shared Services Center*

### Access Concur

The **email** that you receive will contain a **link**, you may click that link and then enter your username and UMICH password – or you may follow the **navigation** at the top of this document, to end up in the same place.

**Please note: We recommend submitting Concur reports using a browser on your computer rather than a mobile device. There have been compatibility issues reported when submitting Concur reports through a mobile browser. This can cause a report to appear to the user that the report has been submitted when it has actually not been submitted in Concur.**



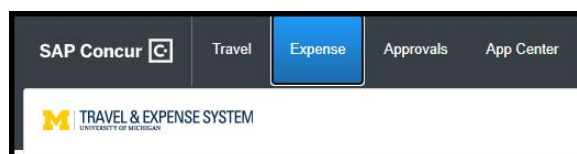
At left is an example of the System-generated email that you will receive from U-M Shared Service Center

You will notice the **Report Name** is listed, as well as the **link** to login to the Concur Travel & Expense System

### Concur – The Expense Pane

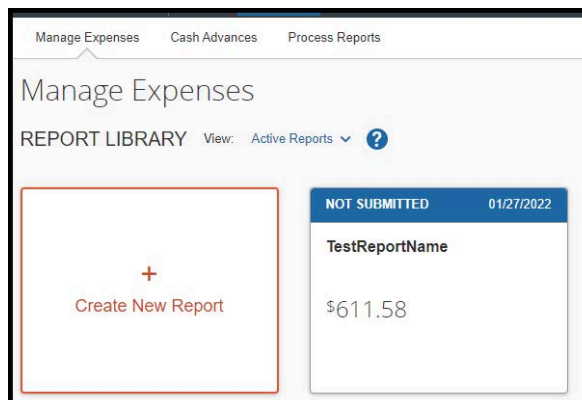
Once logged in to **Concur**:

- ❖ Click on the **Expense** tab



Once in the **Expense Tab**:

- ❖ Under **Report Library**, your active reports will be listed
- ❖ Notice the medium-blue border around the report at right, and the text **“Not Submitted”** at the top
- ❖ **Double-check** that you are submitting the correct expense report (*in the event that you have more than one that are unsubmitted*)





## Method 1: Review Expense Report Line(s) by Clicking on the Individual Line

- ❖ **Verify** that the Shortcode(s) is appropriate for the expense(s) (**Allocations**)
- ❖ **Review** any line **Comment** (ie: explanations of out-of-policy transactions, additional transaction details, et al.)

Verify the following totals, as appropriate:

- ❖ **Personal Expenses** (not eligible for reimbursement or payment by U-M)
- ❖ **Amount Due Employee** (reimbursement)
- ❖ **Amount Due Company Card** (P-Card expenses)
- ❖ **Total Paid By Employee** (amount you owe to the U-M, to be deducted from your next paycheck)

Example of expense line items in an expense report:

Report Details					
Print/Share Manage Receipts Travel Allowance					
Add Expense Edit Delete Copy Allocate Combine Expenses Move to					
Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>	Out of Pocket	Membership & Dues (514930)	AACP Arlington, Virginia	12/14/2022	\$248.00 Allocated
<input type="checkbox"/>	Out of Pocket	Office Supplies (514440)	The Home Depot Ann Arbor, Michigan	12/11/2022	\$6.23 Allocated
<input type="checkbox"/>	Out of Pocket	Travel Taxi Fare (623542 or 623656)	Ann Arbor Taxi Canton, Michigan	12/04/2022	\$45.00
<input type="checkbox"/>	Out of Pocket	Travel Airfare (623590 or 623614)	Delta Air Lines Miami, Florida	12/01/2022	\$312.35
					\$611.58

Reply to the notification email that you received to request additional edits, if they are needed

## Method 2: Review Expense Report by Viewing the UM Detailed Report

For this method, click on the **Print/Share** link, and select any of the **U of M Detailed Reports**:

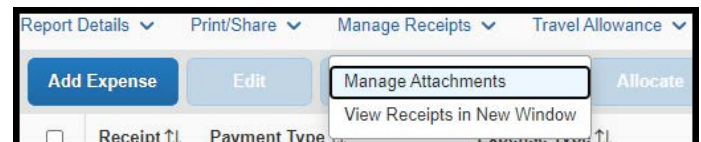
- ❖ **By Payment/Expense type**
- ❖ **By Transaction Type**
- ❖ **By Delegate Rvw'd**



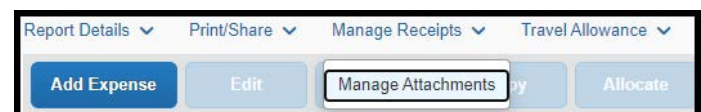
## Review Required Receipts

Verify that delegates or SSC staff have attached all of the required receipts to the report

- ❖ From the **Manage Receipts** hyperlink, select **View Receipts in a New Window**



You will also need to view the receipts attached to each **line item**. If **no receipts** are attached, the **View** option does not appear, as illustrated at right





- ❖ **Verify** that receipt images are **applicable** to the individual line items – and are **legible**
- ❖ **Click Close** to exit the window, when completed

If a receipt image is inaccurate or illegible, email the Shared Services Center at [ExpenseReports@umich.edu](mailto:ExpenseReports@umich.edu) with accurate and/or legible receipts

## Approvers & Adding Additional Approvers

Some departments and/or certain expenses may require **additional approvers** to be added to an expense report - to add/subtract/change the approvers:

- ❖ From the **Report Details** hyperlink, select **Report Timeline**
- ❖ Then click **Edit** in the **Approval Flow** section

The screenshot shows the 'Report Details' menu on the left with 'Report Timeline' selected. The main area displays the 'Report Timeline' for 'TestReportName | \$611.58'. Under the 'Approval Flow' section, there is a radio button for 'Manager Approval' with the name 'Payne, Karen A.' below it. An 'Edit' link is visible next to the 'Approval Flow' header.

To add an approver **AFTER** the listed Manager Approval

- ❖ Click **+Add Step** below the listed approver

To add an approver **BEFORE** the listed Manager Approval

- ❖ Click the **+Add Step** above the listed approver

The 'Edit Approval Flow' window shows a list of approvers. The first approver is 'Payne, Karen A.' with a dropdown arrow to its left. A '+ Add Step' link is located above the list, and another '+ Add Step' link is located below the first approver's name. 'Cancel' and 'Save' buttons are at the bottom right.

**Adding** an approver will add a **User-Added Approver** field

- ❖ **Click** on the filter to the left of the field
- ❖ **Select** how you wish to search for your approver
- ❖ Supported fields include: *Last Name, First Name, Email Address*
- ❖ Enter your parameters
- ❖ **Select** the person you wish to add to the **Approval Flow**, and click **Save**

The 'User-Added Approver' window features a search bar with a dropdown filter set to 'Last Name'. Below the search bar, a list of search criteria is shown: 'Last Name', 'First Name', 'Email Address', 'Login ID', and 'Employee ID'. The 'Email Address' field shows a partial result 'A.'. A 'Delete' link is in the top right corner.



## Submit the Expense Report

When you are ready to submit the report

❖ **Click *Submit Report***

Several boxes will appear, and you will have to click through all of them to finish submitting your expense report

The **Submit** box will appear first

- ❖ This is an electronic signature, verifying that all expenses are appropriate

The 'Submit' box contains a text area with a disclaimer: 'I attest that all expenses reported herein are University business-related and in accordance with University policy. I further attest that I have not received and will not receive reimbursement from any other source for the expenses reported. I agree that any monies owed to the University from this expense report will be payroll deducted at the maximum amount allowed by law.' At the bottom right, there are 'Cancel' and 'Accept & Continue' buttons.

Next, the **Report Totals** box will appear, review the amounts and any alerts

- ❖ Yellow alerts are reminders and do not necessarily require additional action

The 'Report Totals' box shows a summary of payments. It includes a yellow alert bar at the top stating 'Alerts: 1'. Below this, it lists 'Company Payments' as \$611.58 for the 'Employee' and 'Employee Payments' as \$0.00 for the 'Company'. At the bottom, it provides a breakdown: Amount Total (\$611.58), Requested Amount (\$611.58), Due Employee (\$611.58), Total Paid By Company (\$611.58), Owed Company (\$0.00), and Total Owed By Employee (\$0.00). 'Cancel' and 'Submit Report' buttons are at the bottom right.

Finally, you will have to confirm the **Approval Flow** (again)

The 'Edit Approval Flow' box shows a workflow step for 'Manager Approval' assigned to 'Payne, Karen A.'. It includes an alert bar stating 'Alerts: 1' with the message 'Review approvers in the workflow.' and '+ Add Step' buttons. 'Cancel' and 'Submit Report' buttons are at the bottom right.

The **Report Status** box will confirm that the report was submitted

The 'Report Status' box displays a green checkmark and the text 'Report Submitted'. It also shows 'TestReportName | \$611.58'. A 'Close' button is at the bottom right.

## Remember to Log Off

Log out of **Concur**

Log out of **Wolverine Access**, and

Log out **again** to **un-authenticate** credentials from all University-enabled Web sites